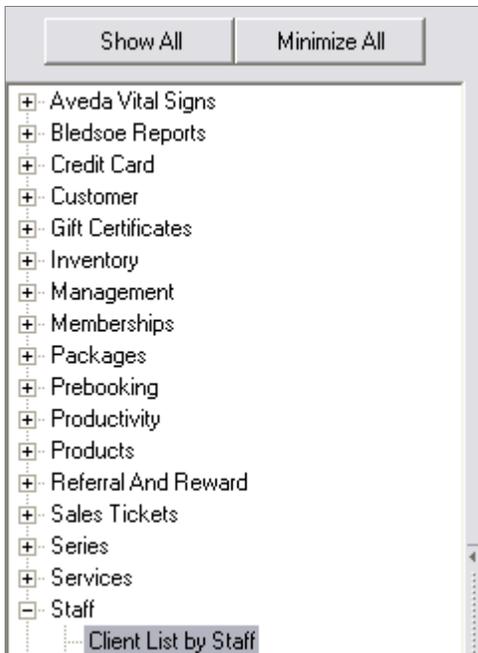


# staff client list

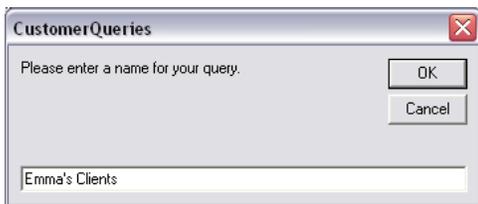
Use this guide to create a staff client list using either a report or a query option.



## Client List by Staff – Report Option

*The Client List by Staff report lists every customer receiving at least one service from the selected staff member. The service ticket must be processed in order for the report to show accurate information.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Client List by Staff from the report list side navigation. You will find it under the Staff category.
3. Enter the date range for the report.
4. Using the drop down menu, answer the question “Would you like to view this report in Label Format?”
5. Click the Ok button.
6. Using the drop down menu, answer the question “Would you like to require the complete address for the labels?”
7. Click the Ok button.
8. Select the staff you wish to view, you will see a check mark by their name when they are selected.
9. Click the OK button.



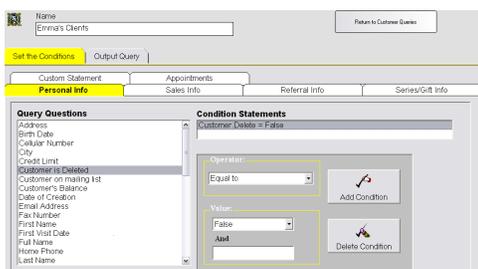
## Client List – Query Option

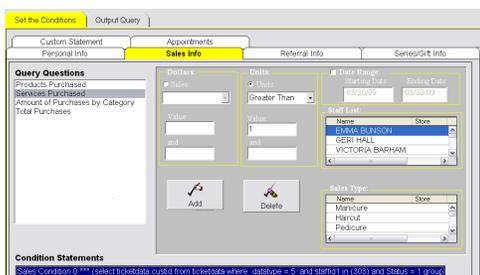
*This query will generate a list of your clients who have had a service with a particular staff member.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. Click the Add button.
4. Type in the name of the query.
5. Click the OK button.

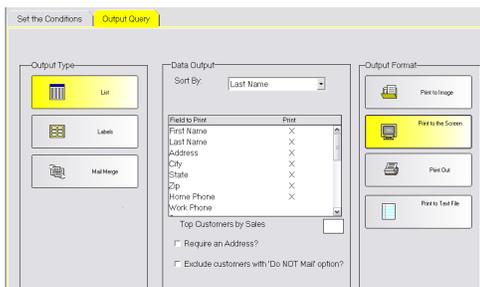
## Set the Conditions

1. In the Personal Info tab, highlight by clicking once on Customer is Deleted in the Query Questions field.
2. Select Equal to in the Operator drop down menu.
3. Select False in the Value drop down menu.
4. Click the Add Condition button. You should see the condition in the box under Condition Statements. *Adding this condition will eliminate those clients who have been previously deleted from your database from the list.*





5. Click the Sales Info tab.
6. Highlight by clicking once on Services Purchased in the Query Questions field.
7. In the Units field, click on the Units circle, you should see a black dot. Note: You should select units over dollars in most situations because of discounts.
8. Select Greater Than in the Units drop down menu.
9. Type in "1" one in the Value field. You can select any value appropriate for your search. Entering in one will generate a list of clients who have been in for a service with the selected staff member more than two or more times.
10. Place a check in the Date range box. A date range is optional. Note: It is easiest to highlight over the entire date range and then type in your new date.
11. Highlight by clicking once on the staff member in the Staff List field.
12. Click the Add button. You should see the condition in the box under Condition Statements. *Adding this condition will generate a list of all of your clients that have had more than one service with the selected staff member.*



## Output Query

1. Click the Output Query tab.
2. Select the desired output in the Output Type field by clicking once on the box. The box will be highlighted yellow.
3. If you are printing labels, select a label from the drop down menu.
  - If you are planning on mailing to the list place a check in the box Require an Address?
  - If you are planning on mailing to the list place a check in the box Exclude customers with 'Do NOT mail' option?
4. In the Field to Print box, double click on the fields you wish to print. There should be an "X" in the Print column.
5. Select by clicking once on the desired output in the Output Format field. Until you familiarize yourself with queries it is good practice to print to the screen. This allows you to check that you have properly set the conditions without wasting paper or labels.

